U.S. Department of Energy Office of Energy Assurance

Energy Assurance: State Stakeholder Meeting





June 9-10, 2003 Loews L'Enfant Hotel Washington D.C.

EXECUTIVE SUMMARY

The Department of Energy's Office of Energy Assurance (OEA) leads the federal effort to ensure a secure and reliable flow of energy to America's homes, businesses, industries, and critical infrastructures. OEA accomplishes this mission by working in collaboration with the Department of Homeland Security and in partnership with industry stakeholders and state and local governments.



OEA conducted a State Stakeholder Meeting June 9-10, 2003 in Washington, DC. OEA, which was reconstituted following the formation of the Department of Homeland Security in March 2003, hosted the meeting as a first step in working with stakeholders to develop a comprehensive and coordinated national agenda for energy assurance. The objectives for the meeting were to understand state stakeholder's perspectives on energy assurance needs and to discuss pathways forward with state and industry stakeholders.

The state stakeholders expressed that some existing energy assurance programs and resources are in place

and working well, but significant coordination and communications gaps exist between federal, state and local, and private industry stakeholders. State stakeholders often do not understand federal versus state energy emergency roles, and the critical importance of energy assurance is not communicated effectively to state-level decision makers. The lack of sustained, consistent support for energy assurance at the federal level has contributed to these issues.

Looking forward, state needs and expectations focus on coordination, communications, policy analysis and support, outreach and training, and technology development. In each of these areas, state stakeholders rely upon OEA to use its leadership role and resources to support, coordinate, and assist states in their energy assurance programs.

Given numerous and diverse state needs and a complex array of stakeholders, the group supported the development of a national agenda for energy assurance. Such an agenda must be developed on a consensus basis by the appropriate cross-section of stakeholders and establish realistic objectives. The national agenda must have a clear scope and not cover old ground, but instead incorporate an assessment of current and past energy assurance efforts.

Industry stakeholders, who joined the meeting for the state's summary presentation and a roundtable discussion, expressed some similar energy assurance needs: clearly defined roles and responsibilities at the federal level, formal communications protocols, a comprehensive inventory of past and current assurance efforts, and a single, comprehensive plan for moving forward. Industry stressed the importance of coordination and effective communications to eliminate redundancy in assurance efforts.

Moving forward, OEA will absorb the input from the state and industry meeting participants as it continues to set up the reconstituted Office and lay the groundwork for a national agenda for energy assurance. OEA will hold additional discussions with these and other stakeholder groups in the next 3-4 months as it continues to further explore stakeholder needs and establish partnerships.

Meeting Participants

State Stakeholders

- Kentucky State Energy Office
- NARUC
- NASEO
- NCSL
- NGA
- Southern States Energy Board
- State of Maryland

Industry Stakeholders

- Alliance to Save Energy
- AGA
- APPA
- The Council on Competitiveness
- EEI
- EPRI
- GTI
- INGAA
- NPGA
- NRECA
- NERC

For a complete attendance list, see Appendix B.

Background

The Department of Energy's Office of Energy Assurance (OEA) leads the federal effort to ensure a secure and reliable flow of energy to America's homes, businesses, industries, and critical infrastructures. It accomplishes this mission by working in collaboration with the Department of Homeland Security and in partnership with industry stakeholders and state and local governments.

The Office of Energy Assurance was reconstituted following a federal government-wide reorganization of homeland security functions as outlined in the Homeland Security Act of 2002. The Office pursues the strategies, functions, and initiatives outlined in the *National Strategy for Homeland Security*, the *National Strategy for the Physical Protection of Critical Infrastructures and Key Assets*, and the *National Strategy to Secure Cyberspace*.

In keeping with its collaborative approach, OEA conducted a State Stakeholder Meeting June 9-10, 2003 in Washington, DC. OEA hosted the meeting as a first step in working with stakeholders to develop a comprehensive and coordinated national agenda to energy assurance. The objectives for the meeting were to understand state stakeholder's perspectives on energy assurance needs and to discuss pathways forward with state and industry stakeholders.

The 1-½ day meeting explored the experiences and needs of state stakeholders, outlined the key characteristics of a national agenda for energy assurance, and brought forward the needs and concerns of industry stakeholders during a roundtable discussion (see Agenda in Appendix A). State stakeholders participated in the entire meeting, while the industry representatives joined the meeting for the final summary session and roundtable discussion. The meeting was conducted in a facilitated format, but the dialogue was given few boundaries so that participants could express a wide range of ideas and concerns. A meeting participant list is included in Appendix B.

Introductory Session

Denise Swink, Acting Director of the Office of Energy Assurance, began the meeting with a brief presentation on the reconstituted Office (Appendix C). This presentation established a vision for a robust, secure, and reliable energy infrastructure that will be accomplished in partnership with states, local governments, and private industry. The Office will conduct its energy assurance responsibilities through six functions: Energy Emergencies Support and Management, Enabling

Assessment Partnerships, State and Local Government Support, Criticality of Assets,

Technology Development and Application, and Policy and Analysis. In order to create a framework for identifying, implementing, and coordinating energy assurance efforts, OEA will collaborate with key stakeholders to develop and implement a sustainable and evolving national agenda for energy assurance.

National Agenda

Strategic Roadmaps

Implementation



State Stakeholder Perspectives

F ollowing this presentation, the state stakeholders related their experiences of working with OEA, expressed their needs and expectations, and identified key attributes for a national agenda for energy assurance. The results from these discussions are shown below in Tables 1-3.

"The state-level data is critical, has worked well, and is a critical component of response."

Jeff Genzer,National Associationof State Energy Officials

The state stakeholders felt that a handful of existing assurance programs (e.g., SHOPP) and resources (e.g., state-level energy data) are in place and working well (Table 1). A number of communications programs, industry group-led initiatives, and collaboration efforts amongst stakeholders groups are underway and achieving good results.

However, two central themes of what is *not* working well are coordination and communications. Many state stakeholders do not understand federal

versus state energy emergency authorities and roles. Regional coordination at the state level is also lacking. The critical importance of energy assurance is not communicated effectively to state-level decision makers. A shortcoming that underlies each of these issues is the lack of sustained, consistent support for energy assurance at the federal level.

Table 1. State Stakeholders: Understanding Where We Are

WHAT IS WORKING WELL

- SHOPP (State Heating Oil and Propane Program)
- Good state-level data quality from EIA
- State-level data is critical and has worked well
- NERC's activities are effective
 not mandatory
- Sharing of model agreements, legal documents, executive orders
- Midwest regional conference call to report on status of energy stocks
 - Propane
 - Distillates
 - Other

WHAT IS NOT WORKING WELL

- Energy emergency function at the federal level has risen and faded over time
- · Consistency is needed
- Unclear what the Federal and state authorities are
 - Interrelationships not understood
- · A need for additional data exists
- Energy often does not make it on the list of top state priorities
- Energy is not prominent enough in homeland security awareness
- Need to identify links between natural gas and electricity
- Need to know the impacts on the industry that result from fuel switching
- Need better regional coordination (between states)
- No effective system to coordinate environmental and energy officials
- Inadequate authorities
- · State vs. federal authorities are not clear
- Connecting energy people to existing communications mechanisms
- Lack of control of gas allocation (convenience stores)

ISSUES

- Different energy system and functions now than in the 70's different needs
- Energy is a part of everything can cascade
- Having people who know about energy complexity is critical
- Different states have different structures—leads to confusion
- Very significant turnover in states
- States do not fund energy emergency planning they react when events occur

Table 2. What Do the States Expect from the Federal Government?

NEEDS AND **E**XPECTATIONS

- One official point of contact
 High level attention
- Education (continuous) and coordination of state policy makers
- Assistance in developing communication protocols
- Establish regular communication between state and federal policymakers via regular meetings
- Timely and accurate state-level energy data and industry analysis
- Support development of educational and analytical materials
- Regional coordination mechanisms needed for planning
- Support multi-state emergency response exercises
 - Focus on recovery time
- Near-term regional coordination: direct information to states re: energy emergencies to support state-level decisions
 - Give states the ability to provide succinct, timely information to governors
- · Help states adopt model state protocols
- Summer and winter fuels meetings:
 - Electric
 - Natural gas
 - Heating fuels
 - Transportation fuels

- Technical and financial assistance for planning
- Standardize telecommunication devices for emergency workers
- · More states in SHOPP
- Assistance in developing a model state protocol focusing on information disclosure, cost recovery
- Assist states in creating a climate that supports energy security investments
- Address market failures that affect energy security assurance
- Support for new technologies for a more robust infrastructure
- Leadership for states in developing supportive policies
- Support development of sample state legislation and model rules
- Assist in establishing communications among state policymakers
- Support technical assistance to state policy makers
- Support states in addressing: information exchange, paying for energy security, policy related to security
- More structured, formal approach to handling energy emergencies
- Institutional model for ongoing training
- Training to reflect more complex energy environment
 - Example: over 200 fuels tracked

MOVING FORWARD

- National Agenda is a good idea
 - Set objectives appropriately
 - Consensus-based process
 - Get the right people involved
 - How to integrate industry?Explore interdependencies
 - Ongoing advisory
- committee?
 Need more systematic
- Need more systematic approach
- Use existing recommendations from state implement/prioritize
- Use upcoming state meetings to get DOE to talk with groups
 Models
- EPA Acid Rain Policy is an example
- National Wind Coordinating Council is an example

Once the current situation had been established, the states' needs, expectations, and suggestions for moving forward were explored (Table 2). State needs and expectations focus on coordination, communications, policy analysis and support, outreach and training, and technology development. In each of these areas, state stakeholders rely upon OEA to use it leadership role and resources to support and assist states in their energy assurance programs.

One prominent issue is the need for *continuous* education at the state legislature level due to the frequent turnover in personnel. Increased education would increase the awareness of energy infrastructure security at the state level and also help to support a policy environment conducive to energy assurance. Education and outreach at the state level could therefore address several of the states needs and expectations.

"In terms of policy makers, the education component is the most important part."

Delegate Carol Petzold,State of Maryland

The list of state needs is broad and diverse. The group felt that a national agenda for energy assurance would be very useful to address these needs in an integrated framework. The agenda should be developed on a consensus basis by the appropriate cross-section of stakeholders and establish realistic objectives.

When discussed in greater detail, it became apparent that a national agenda for energy assurance should address critical issues, include a diverse array of groups, and incorporate key attributes to be successful (Table 3).

Table 3. Energy Assurance State Stakeholder Meeting: National Agenda

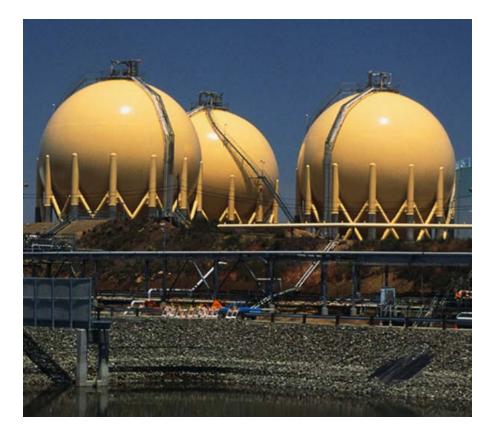
QUESTIONS FOR THE WHO NEEDS How Do We Get Consensus KEYS TO SUCCESS NATIONAL AGENDA To BE INVOLVED **ON NATIONAL GOALS** What are the long-term State Government Look at it like a political How do we choose/sort national goals? State Energy Office through goals campaign! How to sustain a Policy Committee structure Don't reinvent the wheel commitment? State regulators Identify champions Create a summary How to make energy a Energy (PUC) Activists inventory that surveys high priority? Environment Executive Committee, energy assurance How does it get paid for? State legislators Regional representatives activities What are industry's · Members of Congress function, Ad Hoc committees Provide appropriate priorities? Federal government: information to state - Executive, Regional, Ad Hoc How are they set? DHS First articulate what is at stake legislators How much energy DOE Get the right groups involved Including exercises assurance is enough? DOT Support from the White House and efforts How does national Getting legislators to **EPA Process** agenda relate to Environmental officials Write final paper focus on energy legislation? Consumer organizations assurance issues Convene meetings What are the roles of key Other DOE offices Clearly define Prepare issue briefs stakeholders Funders and policy parameters scope Define issues makers, LWV, AAUW Federal vs. state vs. Bring in the "unlikely" Agree on a good process that moves toward consensus industry Farmers, agriculture actors Who should have access Railroads, trucking Focus on the leaders to information? Environmental (e.g., California and New York) Industry's view on state representatives Form a consensus-building policies (e.g., NRDC) organization What role does insurance Academics (economics, Agree on goals early, in levels (industry) play? engineering) of expectation How to avoid unintended State governments Demonstrate need (what's at consequences? energy, regulatory and stake) and viable solutions Establish easy buy-ins to Identify relevant groups emergency management How to identify and Refiners, pipeline meet need reduce gaps in operators, marketers, Pilot projects understanding energy producers Recognize regional differences assurance? Educators (Universities, How to measure forums, foundations, progress? academies) National laboratories Regional representatives State/local government, mayors, counties Transportation organizations (rail, etc.)

The national agenda will address many state stakeholders needs, such as establishing goals, defining roles and responsibilities, and supporting a sustainable national energy assurance program. It must have a clear scope and not cover old ground, but instead incorporate an assessment and inventory of current and past energy assurance efforts. Building consensus on the goals of the national agenda is a critical element that requires identifying champions, involving the appropriate groups, and utilizing an effective structure. Beyond the obvious energy security-related groups that must be involved (e.g., DOE, DHS, state and local government, industry), organizations with less direct links must also be engaged (e.g., insurance industry, environmental organizations, transportation groups).

"Once OEA gets up and running and [roles] are clarified we'll all be a lot more comfortable."

> – Diane DeVaul, Northeast-Midwest Institute

At the conclusion of their discussions the state stakeholders summarized their perspectives on energy assurance in a brief presentation (Appendix D). Matthew Brown of the National Conference of State Legislatures presented on behalf of the group to their industry counterparts, who joined the meeting at this point.



Industry Stakeholder Perspectives

Industry stakeholders offered numerous observations and posed questions and concerns based on their experience in working with the government on energy assurance. Foremost among industry's needs is a clear and formal coordination of federal roles and responsibilities. Industry groups want to know which federal organizations are responsible for certain functions

"We need to assess exactly where we are today and what we've accomplished in the past."

Michael Hyland,American Public Power Association

to make their energy assurance efforts more efficient and less redundant. A clearer delineation of federal roles is also necessary to improve communications.

Another prominent industry need is improved coordination of energy assurance efforts throughout industry and government. Past and current assurance activities should be recognized and built upon as needed, and future initiatives should be prioritized and coordinated in the context of a comprehensive plan.



The industry participants also provided insights on the best ways to move forward with a concerted, coordinated approach to energy infrastructure assurance, including the following suggestions:

- Establish clearly defined roles and responsibilities for government groups involved with infrastructure assurance.
- Coordinate and consolidate R&D initiatives to determine what efforts are underway, what technology can be used now, and what technology is more viable for the long-term.
- Assess where we are today and what OEA and industry have already accomplished in the past.
- Avoid redundancy in modeling, meeting topics, assurance initiatives, and other areas.
- Establish and maintain two-way communication between industry and government.
- · Consider security as a component of reliability.
- Be cognizant of "meeting fatigue" and its impact on industry stakeholders.
- Provide industry with a mechanism to supply their ideas and information on what they have already done to OEA
- Develop a single, comprehensive plan for energy assurance that industry can endorse and follow.
- Educate others in the economy of the importance of energy assurance.
- Recognize that both energy efficiency and energy assurance are continual processes of improvement.
- Capitalize on the current situation as an opportunity to look forward and develop a vision for the industry that involves energy efficiency and energy conservation.
- Consider the role and needs of end users in energy assurance efforts.

"If the government can speak with a single voice on these issues it will be very, very helpful."

> – Larry Brown, Edison Electric Institute

"Please come up with a plan that we can get behind, endorse, and work on so we're not working a little bit here and a little bit there."

 Lou Leffler, North American Electric Reliability Council

Next Steps

EA's efforts to create a robust, secure, and reliable energy infrastructure will be conducted in partnership with the states, local governments, and private industry. Accordingly, OEA

"Let's take this opportunity to get it right, put it in place, and give it some staying power."

Denise Swink,Office of Energy Assurance

will absorb the input from the state and industry meeting participants as it continues to set up the reconstituted Office and lay the groundwork for a national agenda for energy assurance. OEA will hold additional discussions with these and other stakeholder groups in the next 3-4 months as it continues to further understand stakeholder needs and establish partnerships. OEA will also notify the meeting participants when the Office's Program Plan is available (anticipated July 2003).



Appendices

Appendix A: Energy Assurance State Stakeholder Meeting Agenda

U.S. Department of Energy Office of Energy Assurance

Energy Assurance: State Stakeholder Meeting

June 9-10, 2003 Loews L'Enfant Hotel Washington, DC

Preliminary Agenda

Monday, June 9

Time	Activity	Leader/Format
12:15 – 1:00	Registration/Check-in for State Stakeholders	
1:00-1:15	Welcome	Denise Swink/
		Alice Lippert
1:15 – 1:45	Introductions/Opening Thoughts	All
1:45 – 4:15	- What has been your involvement with DOE with respect to energy assurance/energy emergencies? Facilitated Session	All
1.10	Turindia Session	(Jack Eisenhauer -
	What is working well?What is NOT working well?New ideas	Facilitator)
	Break 3:00 – 3:15	
4:15 - 5:00	How do we move forward?	Denise Swink/All
5:00	Adjourn	

Tuesday, June 10

Time	Activity	Leader/Format
8:00 - 8:30	Continental Breakfast	
8:30 - 11:00	Facilitated Session	All
		(Jack Eisenhauer -
	Process for Defining The End State: Developing a	Facilitator)
	National Agenda for Energy Assurance	
	Break 10:00 – 10:15	
11:00 - 11:30	Synthesis of Approach/Ideas	All
11:30 – 12:30	LUNCH	Hotel Restaurant
1:00	Energy Industry Stakeholders Join the Meeting	
1:00 - 1:45	State Needs and Expectations:	Designated
	Presentation of Findings	Presenter(s)
1:45 – 2:45	Roundtable Discussion: Where do you go from here?	All
2:45 – 3:00	Closing Comments	All

Appendix B: Energy Assurance State Stakeholder Attendee List

Hosts:

Denise Swink Office of Energy Assurance Alice Lippert Office of Energy Assurance

State Stakeholders:

John Davies Kentucky State Energy Office

Chuck Gray National Association of Regulatory Utility Commissioners
Michelle Merrill National Association of Regulatory Utility Commissioners

Frank Bishop National Association of State Energy Officials
Jeff Genzer National Association of State Energy Officials
Matthew Brown National Conference of State Legislatures

Diane Shea National Governors Association
Chris McIlroy NGA Center for Best Practices
Diane DeVaul Northeast-Midwest Institute
Carolyn Drake Southern States Energy Board

Carol Petzold State of Maryland

Industry Stakeholders:

Mark Hopkins Alliance to Save Energy
Gary Gardner American Gas Association

Michael Hyland American Public Power Association

Chad Evans

Kim West

Council on Competitiveness

Council on Competitiveness

Larry Brown

Edison Electric Institute

Barbara Bauman Tyran Electric Power Research Institute

Melanie Kenderdine Gas Technology Institute John F. Riordan Gas Technology Institute Robert Stokes Gas Technology Institute

Terry Boss Interstate Natural Gas Association of America

Phil Squair National Propane Gas Association

Barry Lawson National Rural Electrical Cooperative Association
Lou Leffler North American Electric Reliability Council

Department of Energy Participants:

Carl Bauer National Energy Technology Laboratory

Grace Dillard Office of Energy Assurance
Hank Kenchington Office of Energy Assurance
Theo Johnson Office of Energy Assurance
David Salem Office of Energy Assurance
Craig Zingman Office of Energy Assurance
Tommy Cabe Sandia National Laboratory

Meeting Observers:

Ken Green BCS
Ken Boras BCS
David Lewis BCS

Michael Burdette Crown Consulting

John Cook Energy Information Administration
Henry Weigel Energy Information Administration
Sean Plasynski National Energy Technology Laboratory

Meeting Facilitators:

Jack Eisenhauer Energetics
Jamie Lyons Energetics

Appendix C: OEA Briefing

Office of Energy Assurance U.S. Department of Energy

State Stakeholder Meeting June 9-10, 2003

A Shared Responsibility

Homeland security is a shared responsibility. In addition to a national strategy, we need compatible, mutually supporting state, local, and private-sector strategies.

President George W. Bush July 16, 2002

DOE's Energy Assurance Roots

- □ DOE Critical Infrastructure Task Force (9/97)
- □ DOE Office of Emergency Operations (11/99)
- □ DOE Office of Energy Assurance (5/02)
- □ Homeland Security Reorganization (3/03)
- □ NEW DOE Office of Energy Assurance (3/03)

Context (Post 9/11)

9/01 Attacks on New York and Washington

11/01 DOE Deputy Secretary Forms National Laboratory Task Force

2/02 Deputy Secretary Endorses Task Force Findings

7/02 White House Issues National Strategy for Homeland Security

3/03 Government Reorganizes Homeland Security Functions

3/03 DOE Reorganizes Office of Energy Assurance (OEA)

5/03 OEA Develops Initial Program Plan

Energy Assurance Policy Guidance

- □ National Energy Policy (2001)
- □ National Strategy for Homeland Security (July 2002)
- □ Federal Response Plan (January 2003)
- □ National Strategy for the Physical Protection of Critical Infrastructures and Key Assets (February 2003)
- □ National Strategy to Secure Cyberspace (February 2003)

DOE's Energy Assurance Roles

- □ Lead the federal effort to protect critical infrastructure and key assets in the energy sector
- □ Work with the private sector and state and local governments to ensure a secure and reliable flow of energy
- □ Coordinate with DHS and other federal agencies on cyber and physical protection efforts

Vision for Energy Assurance

To create an energy infrastructure, in partnership with the States, local governments and private industry, that is **robust**, **secure**, and **reliable** in the new threat environment that includes malevolent threats and increasing complexity due to interdependencies

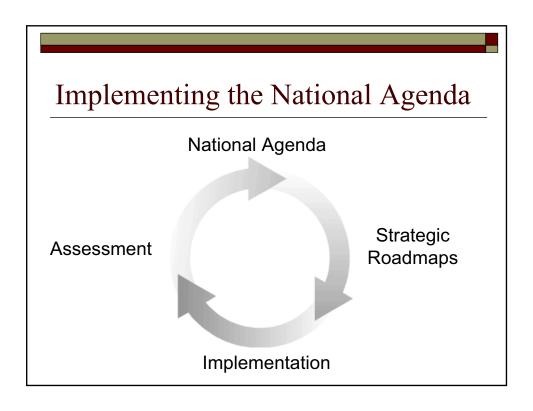
DOE Energy Assurance Functions

- □ Energy Emergencies Support and Management
- □ Enabling Partnerships
- □ State and Local Government Support
- □ Criticality of Assets
- □ Technology Development and Application
- □ Policy and Analysis

National Agenda for Energy Assurance

- ☐ Create a national framework for coordinating energy assurance efforts
- □ Define a vision of our end state
- □ Work with the energy sector, state and local governments, federal agencies, and citizens
- □ Build on existing studies and findings
- □ Develop the business case for energy security
- □ Develop priorities and performance measures





Appendix D: State Perspectives on Energy Assurance Presentation

State Perspectives on Energy Assurance

Energy Assurance: State Stakeholder Meeting
June 9-10, 2003

Participating Organizations

- National Association of State Energy Officials
- National Association of Regulatory Utility Commissioners
- National Governors Association
- National Conference of State Legislatures
- Southern States Energy Board
- Northeast-Midwest Institute

Purpose

- Understand state concerns in protecting energy systems and assuring energy delivery
- Answer the question: "What do states expect from the federal government?"
- Outline a process for moving forward

Bottom Line

- It's an ongoing process no quick fixes
- Energy is key for many interdependent infrastructures
- Systems work great 99%+ of time but states need to be prepared
- Need to understand roles: industry, federal, and state
- States need to be at the table to address nearterm and long-term needs
- We share a common interest in making energy assurance happen!

State Needs: Communication

- Single point-of-contact at DOE for energy disruptions & emergencies (high level)
- Facilitate communication among state officials in emergencies
 - Help in developing communications protocol
- Provide timely, accurate state-level data and analysis
- Standardize telecommunications for emergency workers

State Needs: Coordination and Planning

- Regional coordination to align states
- Support for multi-state emergency response exercises
- More states in the State Heating Oil and Propane Program
- Summer and Winter Fuels meetings
- Technical and financial assistance for planning

State Needs: Policies (1/2)

- Promote a more structured, formal approach to handling energy emergencies
- Address market failures that inhibit energy assurance
- Support new technologies for a more robust, secure energy infrastructure

State Needs: Policies (2/2)

- Help create a supportive climate for investments in energy security
 - Model state protocol on critical infrastructure policies and practices
 - Information disclosure (FOIA, etc.)
 - Cost recovery
 - Energy policies related to energy security (energy facility siting, fuel diversity, open meeting laws, etc.)
- Assist state policy makers
 - Develop sample state legislation and model rules
 - Educational and analytical materials
 - Coordinate national and regional meetings

How Do We Move Forward?

- Support the development of a "National Agenda for Energy Assurance"
- Implement near-term (<18 months) actions for priority needs
- Use upcoming state meetings to communicate DOE's new role and approach

National Agenda: Questions

- What are the long-term goals? How much energy assurance is enough? How to measure progress?
- What are the roles of federal vs. state vs. private sector?
- How to make energy assurance a high priority with sustained commitment?
- What are industry's priorities? How are they set?
- Who should have access to information?

National Agenda: Questions

- What are industry's view of state priorities?
- How to reduce gaps in understanding energy assurance?
- How to avoid unintended consequences?

National Agenda: Keys to Success

- Clearly define parameters and scope
- Don't reinvent the wheel
- Create an inventory of activities, actions, and exercises
- Get legislatures focused on energy assurance
- Include the right people (including the "unlikely actors")

Getting Consensus on National Goals

- Get the right groups involved
- Identify leaders, champions, and activists
- First articulate what is at stake
- Agree on a good process
- Establish easy buy-ins
- Recognize regional differences
- Agree on goals early, consider levels of expectations

